



# WOLFGANG

CAPITAL®

## I HAD NO IDEA YOUR FIRM DID THAT!

Whether you're a long-time client or just coming on board, we're proud to offer an extensive suite of services. Here's a look at some of the resources we can provide.

|                                |                           |                           |
|--------------------------------|---------------------------|---------------------------|
| CPA REFERRALS                  | ESTATE ATTORNEY REFERRALS | CAPITAL PRESERVATION      |
| FIXED & FIXED INDEX ANNUITIES* | LIFE INSURANCE QUOTES*    | ROTH CONVERSIONS          |
| PORTFOLIO ANALYSIS             | CUSTOMIZED PORTFOLIOS     | STOCK OWNERSHIP TRANSFERS |
| PENSION PLANNING               | MEDICARE PLANNING*        | SOCIAL SECURITY PLANNING  |
| TAX MINIMIZATION STRATEGIES    | LONG TERM CARE QUOTES*    | INVESTMENT COST ANALYSIS  |
| DEATH SETTLEMENT ASSISTANCE    | WEALTH TRANSFERS          | SURVIVOR BENEFITS         |
| VETERAN RETIREMENT PLANS       | COUPLES RETIREMENT PLANS  | INCOME STREAM PLANNING    |
| WEALTH MANAGEMENT              | 401K & PENSION ROLLOVERS  | SPOUSAL CONTINUATION      |

TEMECULA | SAN DIEGO | CARLSBAD

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